

RETIREMENT MEMBER SERVICES MANAGER

DEFINITION:

Under direction, to implement and administer policies and procedures in accordance with the County Employees Retirement Law of 1937, County and state mandates in the delivery of retirement benefits to employees within the San Diego County Retirement Association (SDCERA); and to perform related work.

DISTINGUISHING CHARACTERISTICS:

This classification reports to the Director, Member Services or Assistant Director, Member Services. Incumbents supervise a division responsible for providing service and counseling to members of the SDCERA; process retirement applications, and maintain records of members.

Retirement Member Services Manager differs from the next highest class, Assistant Director, Member Services in that the latter is a member of the management team for the Retirement Office with responsibility for integrating benefit administration with other areas of the Association i.e., investments, finance and technology, and administration.

Incumbents in this classification are responsible for handling confidential retirement personnel and/or employment transactions.

EXAMPLES OF DUTIES:

Represents the County on matters concerning retirement; interprets County Employees Retirement Act of 1937 and other County policies for employees, County officials, attorneys and the public; coordinates, oversees and administers the disability retirement program; supervises and oversees the maintenance of demographic records and financial accounts for all active and retired members of the SDCERA system; interviews disability applicants, attorneys, and County departments to explain legal processes; interacts with medical providers and other County departments on disability retirement issues; interacts with the Department of Human Resources on Workers' Compensation and disability retirements; prepares complex and confidential correspondence to attorneys or disability applicants; confers with counsel and assists with the preparation of cases for litigation; ensures that State statutes and County policies are followed in the processing of new hires, terminations, refunds, deferred retirement, reciprocity, retirement estimates, retirement meeting agendas and health insurance plans; audits and calculates personnel data and reciprocal retirement benefits; supervises service credit purchases; reviews pending legislation and prepares position papers; participates in developing communication materials (videos, booklets, pamphlets) for use in workshops and presentations for active and retired members; may lead workshops, presentations, and other public speaking engagements to promote SDCERA as necessary; develops actuarial data; summarizes data and prepares reports for the Retirement Board; selects, trains, and evaluates office personnel; and participates in special projects as required.

MINIMUM QUALIFICATIONS:

Thorough Knowledge of:

- County Employee Retirement Act of 1937.
- Accounting requirements of a retirement plan.
- County personnel rules, practices and procedures.

- Administration of qualified plans.

General Knowledge of:

- State and County retirement codes.
- County policies and procedures including Civil Service Rules, the Compensation Ordinance, hiring, purchasing, grievance and disciplinary procedures.
- Actuarial principles and practices.
- Basic knowledge of information technology skills.
- Employer group health insurance.
- The General Management System in principle and in practice.

Skills and Abilities to:

- Understand and interpret laws, policies and ordinances.
- Calculate and prepare mathematical data relative to payrolls and retirement benefits.
- Supervise, train, coordinate and evaluate employees.
- Manage, coordinate and plan the work of a retirement division.
- Communicate clearly, concisely and effectively both orally and in writing.
- Establish and maintain effective working relationships with employees, officials and the public.
- Calculate and prepare mathematical data relative to actuarial reports.

EDUCATION/EXPERIENCE:

Education, training and/or experience, which clearly demonstrate possession of the knowledge, skills and abilities stated above. An example of qualifying education/experience is: a bachelor's degree from an accredited college or university in business administration, finance, economics, accounting or other closely related field; AND five (5) years of professional level pension administration experience two (2) years of which included supervisory responsibilities.

Note: Additional years of qualifying experience may be substituted for the education requirement on a year for year basis.

SPECIAL NOTES, LICENSES, OR REQUIREMENTS:

Probationary Period:

Incumbents appointed to permanent positions in this class shall serve a probationary period of twelve months (Civil Service Rule 4.2.5).